MWACOP News Notes

Midwest Area Council for Office Professionals

September 2016 Issue

Message from the Co-Chairs

Welcome to the "Fiscal Year End" edition of News Notes! We hope that your summer has been productive and you have been able to enjoy some time in the sun.

It is that time of year to get geared up for year-end activities such as purchasing, performance evaluations, and cross-over travel. The past few months have kept us busy with ARMP's finalizations, summer travel, the return of the 5% animal care funds, and many miscellaneous other tasks we perform.

Again this year we have been busy incorporating changes into our routines such as the foreign travel yearly entries, a new foreign visitor process, and a new WebTA (4.2) soon to be released. We all have done a great job with these changes and we should all be very proud of the accomplishments and image we portray as the Midwest Area.

The Midwest Area will soon be announcing a PSA/Secretary Conference for fiscal year 2017. We don't know the specifics as of yet but we are looking forward to gathering again. We are certain that the conference/training will have lots of new information and great presentations that you won't want to miss!

We should be having another roundtable/conference call hosted by the MWACOP soon on some foreign travel. Keep an eye out for the invitation! Don't forget. . . there will be a "Part II: Pay and Leave for Temporary Appointments" webinar to follow-up on the Part I that Maria Dallaria presented. In the Part II session we will learn more about how to bring on and maintain each type of temporary employee. We hope that you have been enjoying these sessions. We are trying to keep them informative and not too long. Please be sure to write down any questions you have ahead of time and ask them once we have the conference call.

Our website for the SOP has been undergoing a platform change to Umbraco. This is the same platform change that has been going on with the unit websites. We have noticed that there are some discrepancies with being able to open some of the links and we are trying to resolve the issue.

If you have an area of interest you would like us to address in future roundtables, editions of News Notes or if you see anything that needs updated on the MWACOP website, http://www.ars.usda.gov/Aboutus/Docs.htm?docid=24800, please contact any of the MWACOP members.

Members of the council include:

Jessica Michael (Jessica.Michael@ars.usda.gov) – Sr. Co-Chair
Jacqueline Klaver (Jacqueline.Klaver@ars.usda.gov) – Jr. Co-Chair
Beth Burmeister (Beth.Burmeister@ars.usda.gov) – Ex-Officio
Dorene Hensler (Dorene.Hensler@ars.usda.gov) – Recorder
Kelli Adkins (Kelli Adkins@ars.usda.gov) – News Notes Editor
Chad Henry (Chad.Henry@ars.usda.gov) – SOP/Website Editor
Jessica Boyer (Jessica.Boyer@ars.usda.gov)
Lori Burma (Lori.Burma@ars.usda.gov) – Technical Advisor/NACOP Representative
Deborah Schaefer (Deborah.Schaefer@ars.usda.gov) – Technical Advisor/NACOP Representative
Sherri Buxton (Sherri.Buxton@ars.usda.gov) – Technical Advisor

Jessica Michael, Sr. Co-Chair and Jacie Klaver, Jr. Co-Chair

Look Who is New to the Midwest Area!

Submitted by Beth Burmeister

In June, Maria Rech joined the Food Animal Environmental Systems Research Unit in Bowling Green, Kentucky, as a Program Support Assistant. She filled a vacancy left by Kay Richardson's retirement in October 2015.

Maria comes to ARS from the Kentucky Career Center where she served as a Workforce Development Specialist for two years. During her tenure with the state, she provided a multitude of career counseling services, employment and resume workshops and job search assistance. In addition, she was the main point of contact for employers requesting assistance in promoting and filling immediate job vacancies.

In 2011, Maria retired from the Air Force after 20 years of active service. Throughout her military career, she served as Health Services Manager in various positions from Personnel Administration and Resource Management to Medical Records and Patient Administration.

A few years after retiring from the Air Force, Maria and her daughter, Brianna, moved to Bowling Green where her daughter enrolled in Western Kentucky University's mechanical engineering program.

In her spare time, Maria enjoys cooking, gardening, reading, spending time with her daughter, and creating crafty items to give away. She holds a Bachelor's Degree in Business Administration with a 4.0 GPA from Sullivan University in Louisville, Kentucky. She hopes to pursue a graduate degree in organizational leadership in the near future.

Welcome

2016 Midwest Area Office Professional of the Year Award

Submitted by Jessica Michael

Lori Burma, Agroecosystems Management Research Unit, Ames, Iowa is the recipient of the 2016 Midwest Area Office Professional of the Year Award, "for outstanding achievements as a Program Support Assistant and service to office professionals in ARS."

Lori began her federal career in 2007 as the new Secretary/OA for the Swine Oder & Manure Management Research Unit at the National Soil Tilth Lab in Ames, Iowa. She is currently the Program Support Assistant for the Agroecosystems Management Research Unit at the lab which is now known as The National Laboratory for Agriculture and the Environment. Lori's Unit consists of 11 scientists and approximately 30 technicians and students.

Lori is a past member of the Midwest Area Council for Office Professionals (MWACOP) since 2012; serving as Recorder, Jr. Co-Chair, and Sr. Co-Chair. In February 2015, the MWA Director nominated Lori to the National Advisory Council for Professionals (NACOP) as the MWA representative. The nomination was accepted for a three-year term. Lori currently serves as the NACOP Jr. Co-Chair and will take over the reins as Sr. Co-Chair next year. As the MWA NACOP representative and Technical Advisor, Lori is still a part of the MWACOP team.

Lori's favorite part of her job is the diversity; not only in the work that she does, but the people she serves. She finds a deep sense of gratification in problem solving, and is very proud to be part of the ARS and its amazing research.

Outside of work Lori enjoys reading, outdoor activities, and spending time with family and friends.

Lori's advice to Office Professionals is to focus your time, effort, and energy toward finding resolutions and not fretting over the task or problem.

Congratulations Way to go!

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NACOP held their annual meeting, June 21-23, 2016, in Charleston, SC at the U.S. Vegetable Laboratory. They received a wonderful tour of the facility. They reviewed the Charter, recognized accomplished goals for the past year, set new goals for the upcoming year, and began planning a 2017 workshop for Office Professionals. Janel Nierman was promoted to Sr. Co-Chair and Lori Burma was elected to serve as Jr. Co-Chair. Two members rotated off the council (one left due to a position change with ARS) and they welcomed five new members. The number of new members was due to the Area re-organization warranting a change in the Charter to have each Area represented by two members instead of one. The NACOP website has been moved to Axon and is located under "Inside ARS – Areas & Offices – Councils for Office Professionals." It is also on the home page as a link in the first paragraph. The last evening they had dinner in historic downtown Charleston and took a walking tour of the area.

Submitted by Lori Burma & Deborah Schaefer
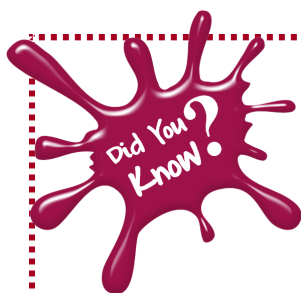
Submitted by: Jessica Boyer

Updating citations in ARIS is one of the many key functions of the PSA. The PSA has a remarkable assistant with the "generate citation" button but it is still imperative that the PSA keenly checks the citation to ensure its accuracy. Some citations subsume only DOI numbers while others contain a print citation. But, did you know that when the publication has both a DOI number and print information that both need to be consolidated into ARIS? When the author apprises the PSA that the publication has been published, there is usually a DOI number because the journal is first published online. If the publication is solely an online journal, it will often times only consist of a DOI number. PSAs must scour the published journal to collect the information for the citation in its entirety for the volume *and* issue number because more often than not, the information is present and must be reflected in ARIS.

Depending on the author's preference, middle initials may or may not be in the published article. If the journal does not list the middle initial of the author, ARIS must be reflected the same way. If the journal lists the middle initial of the author (and sometimes there may be two middle initials) the citation in ARIS must also reflect it. ARIS does not always contain the middle initials of saved authors so it is up to the PSA to compare and contrast the published journal to correct the generated citation in ARIS.

An example of a correct citation should mirror the following:

Nichols, N.N., Saha, B.C. 2016. Production of xylitol by a Coniochaeta ligniaria strain tolerant of inhibitors and defective in growth on xylose. Biotechnology Progress. 32(3):606-612. doi: 10.1002/btpr.2259.

Pay particular attention to the "doi" being lower case, a space following the colon, and the alpha-numeric number.

Combined Federal Campaign

Submitted by Dorene Hensler

The Combined Federal Campaign (CFC) has been around a while; more than 50 years! It got its start in 1957 when President Dwight D. Eisenhower established the "President's Committee on Fund-Raising within the Federal Service". Then, in 1961, President John F. Kennedy abolished that committee and gave authority to the Civil Service Commission to organize non-profit solicitations of federal government employees. Finally, in 1982, President Ronald Reagan signed the Executive Order that created the CFC as we know it today.

CFC is an official government activity authorized by the regulations issued by the Office of Personnel Management. The mission of the CFC "is to promote and support philanthropy through a program that is employee focused, cost-efficient, and effective in providing all federal employees the opportunity to improve the quality of life for all".
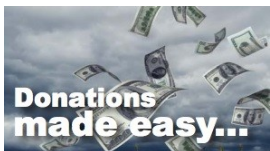
All CFC donations are voluntary and can be made by payroll deduction or electronic check. Payroll deduction gives employees the ability to balance their personal financial obligations and still have a positive impact on the work of the charities that they care about. All CFC donations are tax deductible, but payroll deductions are not made pre-tax. Donations can be as small as $1.00 per pay period, with no restriction on the maximum amount. Even though it seems to be an insignificant amount, giving as little as $1.00 a week can have a big impact.

From the CFC Today (https://cfctoday.org) website:

$1 a week buys . . .

- 12 elementary school students with trained volunteer tutors to help with reading and math;
- 10 children with bilingual beginning-to-read books to build early literacy skills;
- Three 30-minute appointments for health assessment and counseling for individuals facing physical, developmental or mental health challenges;
- 1 acre of unprotected tropical rainforest which assures protection of the natural areas vital to our climate and diverse species;
- 1 hour of expert training for a citizen's group interested in preserving natural areas in their communities.

. . . That's $52 a year.

The CFC organizes all fund raising conducted by approved agencies among federal employees and members of the Armed Forces in the workplace, and organizes the charities geographically so people can choose whether to contribute to charities in their community, across the country, or anywhere in the world.

Here in the Midwest Area, CFC fundraising activities are permitted with the approval of the Ethics Officer. Ethics Form OE-109, CFC Event Review Form, must be completed by anyone organizing a CFC event. Completed forms should be sent to Kathy Jones, Midwest Area Ethics contact, to request approval. Kick-off events and other promotional non-fundraising activities in support of CFC also requires appropriate authorization.

Even though each of us may have no direct involvement with a charity on a personal level, *each of us benefits* from living in a community that provides so many services for all who want or need them. Sadly, experience and recent events have taught us that we, or someone close to us, may be just one misfortune away from needing the help of a CFC charity.

The 2016 CFC Official Solicitation Period is September 1 – December 15, 2016.

For more information please go to the CFC website at https://cfctoday.org.

Reminder Calendar

October
- Performance Appraisals (AD-435E) due.
- Submit documentation for employee accomplishments, appraisal, and award forms via proper channels to AO (if at Center, submit through Center Director).
- Prepare and submit new Fiscal Year (FY) Performance Plans (AD-435E) and Individual Development Plans (ARS-48) for all employees.
- Update Mission Statement in ARIS.
- Put files for the coming FY in place and transfer old files.
- Fall cleanup of Incoming Agreements <$25,000 only.
- Funded Postdocs announced.

November
- Update Investigator/SY time on projects in ARIS to agree with Annual Resource Management Plan System (ARMPS).
- Upload complete Performance Appraisals and award packages in PAD.

December
- Prepare new files for the coming year for calendar year files (T&A's and any other "calendar year" files).

January [or during slower times perform these tasks]
- Go through files. Dispose of materials that need to be discarded. Do a general housecleaning of computer files and general files.
- Check expiration dates of passports. If need renewal begin the process (at least 75 days before the expiration).
- USDA No Fear Act Refresher training due (January 31).
- USDA Information Security Awareness Training due (January 31).
- Rethink how you work and establish goals for efficient management of tasks.
- Time to catch up on all paperwork and filing.

March [or during slower times perform these tasks]
- ARIS Spring Clean-up: Update SY manuscript information.
- Mid-Year Progress Reviews due March/April.
- Watch for letter from Area Office to initiate ARMPS process.
- Compile data for ARMPS process. Gather information from SY's for equipment, travel, and personnel.
- Prepare initial draft of ARMP for RL review.
- ARMPS reviews scheduled May/June/July.

April
- Update Mid-Year Progress Reviews in PAD no later than April 30.
- Draft ARMPS is due in the Area Office.

May
- Corrected ARMPS packages due to Area.
- ARIS - Next FY Guideline Dollars file opens for permanent fund transfer actions.

June
- Postdoc application process opens for data entry in ARIS.
- Paperwork to extend projects, add current year funds, and/or extend time in ARIS is due by June 30.
- Watch for announcement from Area Program Analyst to initiate Annual Report (AD-421) process.
- Send Detail by Author reports to SYs to update publications.
- Area requests meeting names and dates for foreign travel anticipated October 1 of coming year through September 30 of following FY. (Travelers names are not necessary at this time.)
- Ethics Training due June 30.

July
- Prepare and enter Annual Reports (AD-421) into ARIS.
- Enter Foreign Travel into FTIS for upcoming FY.

- Area notification of deadline in ARIS for: Permanent or Temporary FY fund transfers between D-type projects; HQ-funded Postdoc's; and, deadline for extramural agreements adding current year funds or extending time in ARIS.
- Postdoc fund transfers to be included in next FY ARMPS are due (person has to be on-board before funds can be transferred). (If you plan to use Postdoc funds next FY, this temporary funds transfer must be put in ARIS now in order to show up in August guidelines.)

August
- Final ARMPS due in mid-August to Area Office.
- Final ARMPS guideline dollars available for printing from briefing packet.
- In ARIS, check to make sure funds were added on all projects, especially those mandated from HQ.
- Pull Detail by Author reports from ARIS and ask for input in preparation for Performance Appraisals (AD-435E).

September
- Prepare requisition AD-700 for Research Support Agreements (RSA) for coming year. Update related documentation.
- Prepare new files for travel vouchers and other "FY" filing.
- Prepare AD-700's to renew service contracts.
- Review Status of Funds weekly.
- Prepare Performance Appraisal (AD 435E) for all personnel. Distribute to supervisors with instructions for completion.
- Request Specific Goals for new Performance Plans (AD-435E) and Individual Development Plan (ARS-48).
- Prepare new Performance Plan (AD-435E) with Specific Goal(s) and Individual Development Plan (ARS-48).
- Late September: Employees submit documentation (no more than 3 pages) of their accomplishments to immediate supervisor for Performance Appraisals (AD-435E).
- Go through both computer and hard copy files, disposing of materials that can be destroyed.
- Review Telework Agreements. Update or change as needed.
- Diversity EEO Policy Statement due September 30.
- Sexual Harassment Statement due September 30.
- Anti-Harassment/Anti-Bullying Policy Statement due September 30.
- Reasonable Accommodation Information Sheet training due by October 1.

Weekly or Regular Basis
- Review ARS-230s for upcoming departure dates, changes in visa status, etc., make necessary changes to reports.
- Back up computer on a regular basis.
- Monitor supplies and order as needed.
- Reconcile credit card transactions within Access Online [AXOL] and CATS.

Bi-weekly
- T&A's (send email to Unit of submission deadline).
- Update REE Directory or send information to person responsible for updates.

Monthly
- When appropriate, monitor OSQR for updated announcements and scheduled CRIS project completion. www.ars.usda.gov/research/docs.htm?docid-1286.
- Monitor required AgLearn Training.
- Reconcile Status of Funds as needed or required.
- Check ARIS to monitor progress of manuscripts, check for any 416/417's, Agreements which will be terminating and need to be extended or will require reports. Request necessary reports from SY's.

Fiscal Year End Travel Tips

Submitted by Jessica Michael

As the fiscal year comes to a closing so do the airfare agreements that we have with all the airlines. If only our travelers could avoid traveling in October it would make our workload a bit easier. Of course that isn't going to happen. But here are a few tips that should make that travel authorization a little bit easier.

Pointers
⇒ It is best to wait until the last possible minute to book FY 17 travel in Concur due to flights and per diem not updating until the beginning or middle of September. We should be notified when these rates are loaded.
⇒ If you do book travel, be aware, flights will be updated causing additional stamps, costs will be changed, and adjustments will be required.

Travel that will span both FY 2016 and 2017 (Authorizations)

1. When making the authorization use the No-Year accounting code (indicated by a "-XX" after the FY indicator in the line of accounting). This accounting code will be available September 1st. Please be patient if it is not ready exactly on that day.

Selected Accounting Code(s)

Budget Period	Accounting Code	Description
FY10 - FYXX	Z93FYCROSS	TRAVEL THAT CROSS FISCAL YEARS

2. When adding expenses we must use the Allocate Expenses by Date Range feature. You can get to this feature by going to the accounting tab and clicking on the symbol that looks like a pie graph.

GUSDAREE033625100 16166015030050

3. From there you will go to another window and you can click on the tab Expense Level Allocation to differentiate which accounting code to use for which expense. Be sure to pick your accounting code as the default first so it is easier to change expenses to the cross year accounting code.

Accounting Codes Allocation Summary for AUTH00926954
Expenses can be allocated by percent, date, expense category/payment method, amount, or individual expense....
Current Allocation Method: By Individual Expenses

Accounting Codes Allocation Summary

| Breakdown By Expense Category | Expense Level Allocation | Document Level Allocation |

Expense Category Allocation Breakdown for
'10XXZ93FYCROSSGUSDAREE033625100'

Expense Category	Payment Method	Sponsor Type	Amount
LODGING-PERDIEM	GOVCC		0.00
M&IE-PERDIEM	PERSONAL		0.00
TRANSXN FEES	GOVCC		0.00
Accounting Total for '10XXZ93FYCROSS'			0.00

Breakdown by Expense Category

Expense Category	Payment Method	Sponsor Type	Allocate by Amount
LODGING-PERDIEM	GOVCC		979.00
M&IE-PERDIEM	PERSONAL		586.50
TRANSXN FEES	GOVCC		14.75

Expense Category Allocation Breakdown for
'16166015030050GUSDAREE033625100'

Expense Category	Payment Method	Sponsor Type	Amount
LODGING-PERDIEM	GOVCC		979.00
M&IE-PERDIEM	PERSONAL		586.50
TRANSXN FEES	GOVCC		14.75
Accounting Total for '16166015030050'			1,580.25

   a. The TMC Fee assessed for airfare should be for FY 2016.
   b. The TAV Fee assessed for using Concur should be for FY 2017.

4. Be Aware that the authorization will reject and NO funds will be obligated. The flights will still be ticketed.

Travel that will span both FY 2016 and 2017 (Vouchers)

1. When the NEW FY 2017 accounting codes are available the authorization must be amended to reflect the appropriate FY 2017 accounting. You will use the Allocate Expenses by Date Range feature again. The Authorization will have to go through the signature process again before the voucher can be created.

2. After the authorization has been amended the voucher can then be completed.

Travel that will take place beginning October 2017

1. When making the authorizations enter the No-Year accounting code. Airfare will not be ticketed until the budget is approved. Once approved you will be able to change the accounting code to the current FY.

Welcome to the Best Practices section. Our goal is to introduce you, the Office Professional (OP), to a Best Practice that is used by another OP and share the knowledge. If you have a Best Practice that you would like to share please send the article/instructions and other materials to Kelli Adkins (kelli.adkins@ars.usda.gov). Any forms/documents that are needed to utilize the Best Practice mentioned below will be located on the MWACOP webpage. Look for an email with a link to the documents. In the meantime all forms or documents needed will be sent in the email with the News Notes.

Travel Spreadsheet
Submitted by Chad Henry

This spreadsheet is designed to keep track of all employees travel to ensure authorizations and vouchers are accounted for and fully completed. If kept on a shared network drive (read only to everyone by PSA) it also allows the employees to open the document and will show them if they have indeed sent their travel documents to the PSA and what the status of it is.

1. Start by entering the scientist\employee name in an open row in column A.

Travel Information

Traveler	Meeting	Depart	Return	Destination	Vehicle
Xavier	Biennial Conference of the Mol	8/7	8/10	Columbus, OH	
Logan	ARS Awards Ceremony	8/15	8/12	Beltsville, MD	
Elliott	NSF-PGRP awardees meeting	9/7	9/10	Washington DC	
Campbell	Medicago Genetics and Genomi	9/18	9/21	Ardmore, OK	
Mitchell	CAMTech: Sep 23-25; ICE + ESA:	9/23	9/28	Orlando, FL	
Nader	CAMTech: Sep 23-25; ICE + ESA:	9/23	10/1	Orlando, FL	
Clinton	Entomologial Society of Americ	9/25	10/1	Orlando, FL	

2. After the name is entered the spreadsheet will automatically add requested information slots in columns C – F. These are highlighted in red until new information is entered.

Traveler	Meeting	Depart	Return	Destination	Vehicle	Turned In	Outside Funds?	Created	CATS Short Data	Signed in Concur	Outside Funds Done	Turned In	Created	Traveler Signed	Concur Upload & Sign	Refund Letter
Xavier	Biennial Conference of the Mol	8/7	8/10	Columbus, OH		7/11	no	7/14	7/14	7/15		8/18	8/22	fill	fill	
Logan	ARS Awards Ceremony	8/15	8/12	Beltsville, MD		7/18	yes	7/19	7/19	7/19	7/19	fill	fill	fill	fill	Fill
Elliott	NSF-PGRP awardees meeting	9/7	9/10	Washington DC		8/15	no	8/18	8/19	8/20						
Campbell	Medicago Genetics and Genomi	9/18	9/21	Ardmore, OK		8/22	yes	8/23	8/25	8/25	Fill					
Mitchell	CAMTech: Sep 23-25; ICE + ESA:	9/23	9/28	Orlando, FL		8/26	no	Fill	Fill	Fill						
Nader	CAMTech: Sep 23-25; ICE + ESA:	9/23	10/1	Orlando, FL		8/26	Fill	Fill	Fill	Fill	Fill					
Clinton	Entomologial Society of Americ	9/25	10/1	Orlando, FL		8/26	Fill	Fill	Fill	Fill	Fill					
Valdez		Fill	Fill	Fill		Fill	Fill	Fill	Fill	Fill	Fill					

Header groupings: Travel Information (Traveler, Meeting, Depart, Return, Destination, Vehicle); Authorization (Turned In, Outside Funds?, Created, CATS Short Data, Signed in Concur, Outside Funds Done); Voucher (Turned In, Created, Traveler Signed, Concur Upload & Sign, Refund Letter)
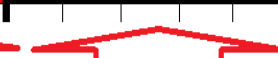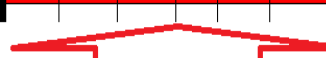
3. Enter the meeting name in column B and the start/end dates in C and D. Date cells are conditionally formatted so past dates are purple, current day is white, and future are blue. This will give you a good indication when a person has returned, is gone, or yet to leave based on color.

* Note that all dates will be entered in the current year unless a year is given when entered. 9/25 will be taken as 9/25/16. If you want a different year than the current one, you will need to type it in i.e. 9/25/17.

	A	B	C	D	E
1		Travel Information			
2	Traveler	Meeting	Depart	Return	Destination
3	Xavier	Biennial Conference of the Mol	8/7	8/10	Columbus, OH
4	Logan	ARS Awards Ceremony	8/15	8/12	Beltsville, MD
5	Elliott	NSF-PGRP awardees meeting	9/7	9/10	Washington DC
6	Campbell	Medicago Genetics and Genomi	8/28	9/21	Ardmore, OK
7	Mitchell	CAMTech: Sep 23-25; ICE + ESA:	9/23	9/28	Orlando, FL
8	Nader	CAMTech: Sep 23-25; ICE + ESA:	9/23	10/1	Orlando, FL
9	Clinton	Entomologial Society of Americ	9/25	10/1	Orlando, FL
10	Valdez	Test Meeting for Spreadsheet	7/1	9/25	Nowhere, ZZ

4. A vehicle column was added to keep track of how the employee was getting to either the airport or driving to the meeting. It can be used generically as POV/GOV or specifically i.e. GT for your unit's Grey Taurus so that vehicles can be reserved for trips.

	A	B	C	D	E	F
1		Travel Information				
2	Traveler	Meeting	Depart	Return	Destination	Vehicle
3	Xavier	Biennial Conference of the Mol	8/7	8/10	Columbus, OH	
4	Logan	ARS Awards Ceremony	8/15	8/12	Beltsville, MD	
5	Elliott	NSF-PGRP awardees meeting	9/7	9/10	Washington DC	POV
6	Campbell	Medicago Genetics and Genomi	8/28	9/21	Ardmore, OK	
7	Mitchell	CAMTech: Sep 23-25; ICE + ESA:	9/23	9/28	Orlando, FL	GT
8	Nader	CAMTech: Sep 23-25; ICE + ESA:	9/23	10/1	Orlando, FL	
9	Clinton	Entomologial Society of Americ	9/25	10/1	Orlando, FL	GOV
10	Valdez	Test Meeting for Spreadsheet	7/1	9/25	Nowhere, ZZ	?
11						
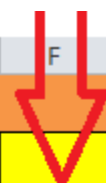
5. In the travel authorization columns (H-M) enter dates of action respectively for when the request as turned in, and when you created the authorization in Concur, CATS short data entry, and when it was signed off by you in Concur. For outside funds enter no or yes depending on whether the trip involves it. If no the cell in column M will black out. If outside funds is involved enter yes and the column M box will remain red and you will need to enter the date you complete the outside funds paperwork.

Before

	Traveler	Meeting	Depart	Return	Destination	Vehicle	Turned In	Outside Funds?	Created	CATS Short Data	Signed in Concur	Outside Funds Done
	A	B	C	D	E	F	H	I	J	K	L	M
1	Travel Information						Authorization					
3	Xavier	Biennial Conference of the Mol	8/7	8/10	Columbus, OH		7/11	no	7/14	7/14	7/15	
4	Logan	ARS Awards Ceremony	8/15	8/12	Beltsville, MD		7/18	yes	7/19	7/19	7/19	7/19
5	Elliott	NSF-PGRP awardees meeting	9/7	9/10	Washington DC		8/15	no	8/18	8/19	8/20	
6	Campbell	Medicago Genetics and Genomi	8/28	9/21	Ardmore, OK		8/22	yes	8/23	8/25	8/25	Fill
7	Mitchell	CAMTech: Sep 23-25; ICE + ESA:	9/23	9/28	Orlando, FL		8/26	no	Fill	Fill	Fill	
8	Nader	CAMTech: Sep 23-25; ICE + ESA:	9/23	10/1	Orlando, FL		8/26	Fill	Fill	Fill	Fill	Fill
9	Clinton	Entomolgial Society of Americ	9/25	10/1	Orlando, FL		8/26	Fill	Fill	Fill	Fill	Fill
10	Valdez	Test Meeting for Spreadsheet	7/1	9/25	Nowhere, ZZ		Fill	Fill	Fill	Fill	Fill	Fill

After

	Traveler	Meeting	Depart	Return	Destination	Vehicle	Turned In	Outside Funds?	Created	CATS Short Data	Signed in Concur	Outside Funds Done
	A	B	C	D	E	F	H	I	J	K	L	M
1	Travel Information						Authorization					
3	Xavier	Biennial Conference of the Mol	8/7	8/10	Columbus, OH		7/11	no	7/14	7/14	7/15	
4	Logan	ARS Awards Ceremony	8/15	8/12	Beltsville, MD		7/18	yes	7/19	7/19	7/19	7/19
5	Elliott	NSF-PGRP awardees meeting	9/7	9/10	Washington DC	POV	8/15	no	8/18	8/19	8/20	
6	Campbell	Medicago Genetics and Genomi	8/28	9/21	Ardmore, OK		8/22	yes	8/23	8/25	8/25	Fill
7	Mitchell	CAMTech: Sep 23-25; ICE + ESA:	9/23	9/28	Orlando, FL	GT	8/26	no	Fill	Fill	Fill	
8	Nader	CAMTech: Sep 23-25; ICE + ESA:	9/23	10/1	Orlando, FL		8/26	Fill	Fill	Fill	Fill	Fill
9	Clinton	Entomolgial Society of Americ	9/25	10/1	Orlando, FL	GOV	8/26	Fill	Fill	Fill	Fill	Fill
10	Valdez	Test Meeting for Spreadsheet	7/1	9/25	Nowhere, ZZ	?	6/20	yes	6/21	6/22	6/23	6/23

6. Because the trip has not ended yet, as indicated by the end date in blue (column D) the voucher boxes are blacked out. Once the trip has completed the end date will be purple and the voucher boxes will turn red and be ready to complete.

	Traveler	Meeting	Depart	Return	Destination	Vehicle	Turned In	Outside Funds?	Created	CATS Short Data	Signed in Concur	Outside Funds Done	Turned In	Created	Traveler Signed	Concur Upload & Sign	Refund Letter	Remarks
	A	B	C	D	E	F	H	I	J	K	L	M	O	P	Q	R	S	U
1	Travel Information						Authorization						Voucher					Remarks
3	Xavier	Biennial Conference of the Mol	8/7	8/10	Columbus, OH		7/11	no	7/14	7/14	7/15		8/18	8/22	fill	fill		
4	Logan	ARS Awards Ceremony	8/15	8/12	Beltsville, MD		7/18	no	7/19	7/19	7/19	7/19	fill	fill	fill	fill	Fill	
5	Elliott	NSF-PGRP awardees meeting	9/7	9/10	Washington DC	POV	8/15	no	8/18	8/19	8/20							
6	Campbell	Medicago Genetics and Genomi	8/28	9/21	Ardmore, OK		8/22	yes	8/23	8/25	8/25	Fill						
7	Mitchell	CAMTech: Sep 23-25; ICE + ESA:	9/23	9/28	Orlando, FL	GT	8/26	no	Fill	Fill	Fill							
8	Nader	CAMTech: Sep 23-25; ICE + ESA:	9/23	10/1	Orlando, FL		8/26	Fill	Fill	Fill	Fill	Fill						
9	Clinton	Entomolgial Society of Americ	9/25	10/1	Orlando, FL	GOV	8/26	Fill	Fill	Fill	Fill	Fill						
10	Valdez	Test Meeting for Spreadsheet	7/1	9/25	Nowhere, ZZ	?	6/20	yes	6/21	6/22	6/23	6/23						

7. So let us look at Logan's travel in row 4 since his travel is complete. The end date has passed, turned purple, and voucher cells are red requesting information. Complete the voucher section as you did the authorization. Enter the dates the traveler gave you on their voucher request, when you created it in Concur, traveler signed the completed voucher and when you submitted the completed paperwork in Concur. Also since this travel included outside funds the refund letter cell is red. This is to remind you to complete a refund letter if the outside funds involved reimbursement to the USDA. If it was only in-kind and remained that way after the trip then you can ignore this cell or just fill in N/A and the cell will turn green.

	Travel Information						Authorization						Voucher					Remarks
Traveler	Meeting	Depart	Return	Destination	Vehicle		Turned In	Outside Funds?	Created	CATS Short Data	Signed in Concur	Outside Funds Done	Turned In	Created	Traveler Signed	Concur Upload & Sign	Refund Letter	
Xavier	Biennial Conference of the Mol	8/7	8/10	Columbus, OH			7/11	no	7/14	7/14	7/15		8/18	8/22	fill	fill		
Logan	ARS Awards Ceremony	8/15	8/12	Beltsville, MD			7/18	yes	7/19	7/19	7/19	7/19	fill	fill	fill	fill	Fill	
Elliott	NSF-PGRP awardees meeting	9/7	9/10	Washington DC	POV		8/15	no	8/18	8/19	8/20							
Campbell	Medicago Genetics and Genomi	8/28	9/21	Ardmore, OK			8/22	yes	8/23	8/25	8/25	Fill						
Mitchell	CAMTech: Sep 23-25; ICE + ESA:	9/23	9/28	Orlando, FL	GT		8/26	no	Fill	Fill	Fill							
Nader	CAMTech: Sep 23-25; ICE + ESA:	9/23	10/1	Orlando, FL			8/26	Fill	Fill	Fill	Fill	Fill						
Clinton	Entomologial Society of Americ	9/25	10/1	Orlando, FL	GOV		8/26	Fill	Fill	Fill	Fill	Fill						
Valdez	Test Meeting for Spreadsheet	7/1	9/25	Nowhere, ZZ	?		6/20	yes	6/21	6/22	6/23	6/23						

	Travel Information						Authorization						Voucher					Remarks
Traveler	Meeting	Depart	Return	Destination	Vehicle		Turned In	Outside Funds?	Created	CATS Short Data	Signed in Concur	Outside Funds Done	Turned In	Created	Traveler Signed	Concur Upload & Sign	Refund Letter	
Xavier	Biennial Conference of the Mol	8/7	8/10	Columbus, OH			7/11	no	7/14	7/14	7/15		8/18	8/22	fill	fill		
Logan	ARS Awards Ceremony	8/15	8/12	Beltsville, MD			7/18	yes	7/19	7/19	7/19	7/19	8/26	8/27	8/28	8/28	N/A	
Elliott	NSF-PGRP awardees meeting	9/7	9/10	Washington DC	POV		8/15	no	8/18	8/19	8/20							
Campbell	Medicago Genetics and Genomi	8/28	9/21	Ardmore, OK			8/22	yes	8/23	8/25	8/25	Fill						
Mitchell	CAMTech: Sep 23-25; ICE + ESA:	9/23	9/28	Orlando, FL	GT		8/26	no	Fill	Fill	Fill							
Nader	CAMTech: Sep 23-25; ICE + ESA:	9/23	10/1	Orlando, FL			8/26	Fill	Fill	Fill	Fill	Fill						
Clinton	Entomologial Society of Americ	9/25	10/1	Orlando, FL	GOV		8/26	Fill	Fill	Fill	Fill	Fill						
Valdez	Test Meeting for Spreadsheet	7/1	9/25	Nowhere, ZZ	?		6/20	yes	6/21	6/22	6/23	6/23						

8. A remarks column (U) is included for any additional comments you would like to add/keep track of. Can be ticket by dates to ensure you sign off in Concur on time, or annual leave comments or anything else you'd like.

	Travel Information						Authorization						Voucher					Remarks
Traveler	Meeting	Depart	Return	Destination	Vehicle		Turned In	Outside Funds?	Created	CATS Short Data	Signed in Concur	Outside Funds Done	Turned In	Created	Traveler Signed	Concur Upload & Sign	Refund Letter	
Xavier	Biennial Conference of the Mol	8/7	8/10	Columbus, OH			7/11	no	7/14	7/14	7/15		8/18	8/22	fill	fill		
Logan	ARS Awards Ceremony	8/15	8/12	Beltsville, MD			7/18	yes	7/19	7/19	7/19	7/19	8/26	8/27	8/28	8/28	N/A	
Elliott	NSF-PGRP awardees meeting	9/7	9/10	Washington DC	POV		8/15	no	8/18	8/19	8/20							
Campbell	Medicago Genetics and Genomi	8/28	9/21	Ardmore, OK			8/22	yes	8/23	8/25	8/25	Fill						ticket by 9/5
Mitchell	CAMTech: Sep 23-25; ICE + ESA:	9/23	9/28	Orlando, FL	GT		8/26	no	Fill	Fill	Fill							
Nader	CAMTech: Sep 23-25; ICE + ESA:	9/23	10/1	Orlando, FL			8/26	Fill	Fill	Fill	Fill	Fill						taking annual leave
Clinton	Entomologial Society of Americ	9/25	10/1	Orlando, FL	GOV		8/26	Fill	Fill	Fill	Fill	Fill						
Valdez	Test Meeting for Spreadsheet	7/1	9/25	Nowhere, ZZ	?		6/20	yes	6/21	6/22	6/23	6/23						

9. Once the voucher is complete and all travel records associated with that travel are complete you can delete that trips row from the spreadsheet (in this example we left click on row #4, then right click on it, finally select delete).
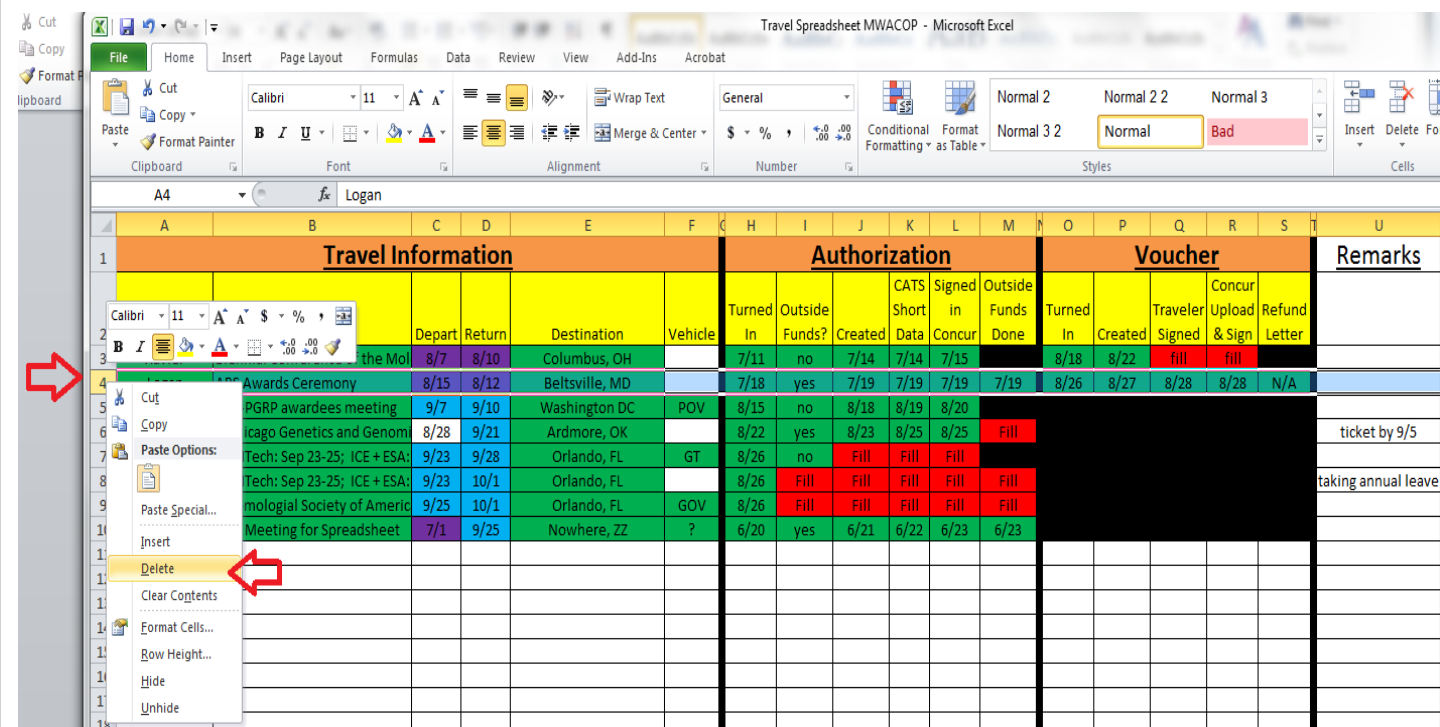
Chad's spreadsheet has been sent as a separate document in your email (attached with this newsletter). If you misplace it or would like to download a copy of it (in the near future) please go to the MWACOP website http://www.ars.usda.gov/Aboutus/Docs.htm?docid=24800.

MWACOP Website

http://www.ars.usda.gov/Aboutus/Docs.htm?docid=24800

MWACOP SOP Website

https://www.ars.usda.gov/midwest-area/docs/sop-manual/

NACOP Website

https://www.ars.usda.gov/national-advisory-council-for-office-professionals/